

C L A I M S

We claim:

1. A method for facilitating at least one donor's management of charitable monies held in at least one donor account comprising the steps of:

- (a) providing at least one central system having organization information regarding at least one philanthropic organization and donor account information regarding said at least one donor account;
- (b) inputting into said system a query requesting said organization information about said at least one philanthropic organization;
- (c) retrieving and displaying said organization information;
- (d) inputting into said system a request to transfer said charitable monies from said donor account to said philanthropic organization;
- (e) generating an order to transfer said charitable monies from said donor account to said philanthropic organization; and
- (f) fulfilling the generated order to complete transfer of said monies.

2. The method of claim 1 wherein said organization information is selected from the group consisting of mission statements, impact statements, backgrounds, histories, executive director statements, geographic information, management information, governance information, board of directors information, organizational infrastructure information, board of directors demographics, board of directors and management biographies, awards, recognition, national affiliations, related organizations, educations, diversity, staffing, contractors, volunteers, financial history, revenue sources, resource allocations, programs, committees, recommendations, reviews, and strategic plans.

3. The method of claim 1 wherein said organization information is displayed in a pre-defined report format.

4. The method of claim 1 further comprising the step of searching said central system for said philanthropic organization using parameters selected from the group

consisting of organization name, keywords, geographic locations, organization types, program types, population served, and alphabetical.

5. The method of claim 1 further comprising the step of inputting into said system a query regarding said account information.

6. The method of claim 5 further comprising the step of retrieving and displaying said account information.

7. The method of claim 6 wherein said account information is selected from the group consisting of donor fund balance, grant history, donation history, contribution history, vouchers, investments, and associated philanthropic organization information.

8. The method of claim 1 wherein said inputting steps are performed using a computer.

9. The method of claim 1 wherein said central system comprises a computer and a repository.

10. The method of claim 9 wherein said central system further comprises a repository having said organization information therein.

11. The method of claim 9 wherein said central system further comprises a repository having said account information therein.

12. A method for developing information regarding philanthropic organizations comprising the steps of:

- (a) gathering information regarding at least one philanthropic organization;
- (b) interviewing said at least one philanthropic organization;
- (c) confirming said information during said interviewing step;

- (d) assessing said information; and
- (e) inputting said information into at least one central repository.

13. The method of claim 12, said information being selected from the group consisting of name, address, telephone number, mission statements, impact statements, backgrounds, histories, executive director statements, geographic information, management information, governance information, board of directors information, organizational infrastructure information, board of directors demographics, board of directors and management biographies, awards, recognition, national affiliations, related organizations, educations, diversity, staffing, contractors, volunteers, financial history, revenue sources, resource allocations, programs, committees, recommendations, reviews, and strategic plans.

14. The method of claim 12 wherein said interviewing step comprises a personal interview with a representative of said at least one philanthropic organization.

15. The method of claim 12 wherein said assessing step comprises assessing factors selected from the group consisting of said at least one philanthropic organization's future and current needs, future and current risks, outcomes, measures, fund or donation development, leadership development, interest in setting up an endowment, fund or other accounting service, and combinations thereof.

16. The method of claim 12 wherein said central repository is a computer data base.

17. The method of claim 12 further comprising the step of requesting an interview with said at least one philanthropic organization.

18. The method of claim 12 further comprising the step of receiving additional information from said at least one philanthropic organization.

19. The method of claim 12 further comprising the step of seeking review,

confirmation and approval of said information from said at least one philanthropic organization prior to said inputting step.

20. The method of claim 19 further comprising the step of providing access to said information to third parties.

21. The method of claim 20 wherein said access is provided via a global computer network.

22. A method for providing information regarding philanthropic organizations to a donor comprising the steps of:

- (a) providing a donor interface;
- (b) logging on to a central controller from said donor interface;
- (c) establishing a communication link with said central controller;
- (d) inputting philanthropic organization search criteria;
- (e) providing data regarding at least one philanthropic organization wherein said data corresponds to said search criteria; and
- (f) transmitting said data to said donor interface.

23. The method of claim 22, said logging on step further comprising inputting a unique identifier corresponding to a particular donor.

24. The method of claim 23 wherein said unique identifier is selected from the group consisting of a username, password, and combinations thereof.

25. The method of claim 23 further comprising the step of providing a donor account corresponding to said unique identifier wherein said donor account comprises donor account data.

26. The method of claim 25 wherein said donor account data is selected from the group consisting of account balance, grant history, contribution history, vouchers,

investments, and combinations thereof.

27. The method of claim 22 wherein said search criteria is selected from the group consisting of name, keyword, geographic location, organization type, NTEE identifier, program type, population served, and combinations thereof.

28. The method of claim 22 wherein said data is transferred from a data repository.

29. The method of claim 22 further comprising the step of refining said search criteria.

30. The method of claim 22 further comprising the step of selecting at least one philanthropic organization from said data for viewing.

31. The method of claim 30 further comprising the step of providing a report in a pre-defined format containing said data.

32. The method of claim 30 further comprising the step of adding said data to a list of preferred data maintained in said donor account.

33. The method of claim 30 further comprising the step of allocating funds from said donor account to said at least one philanthropic organization.

34. The method of claim 33 further comprising the step of transferring funds from said donor account to said at least one philanthropic organization.

35. The method of claim 23 wherein said donor interface is selected from the group consisting of a computer, personal digital assistant, pager, telephone, fax machine, and combinations thereof.

36. The method of claim 23 wherein said central controller comprises a computer, an interactive voice response unit, an operator, and combinations thereof.